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Director of
Central
Intelligence

Top Secret

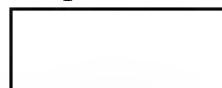
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National Intelligence Daily

*Monday
29 January 1979*

State Department review completed. On file Commerce
release instructions apply.

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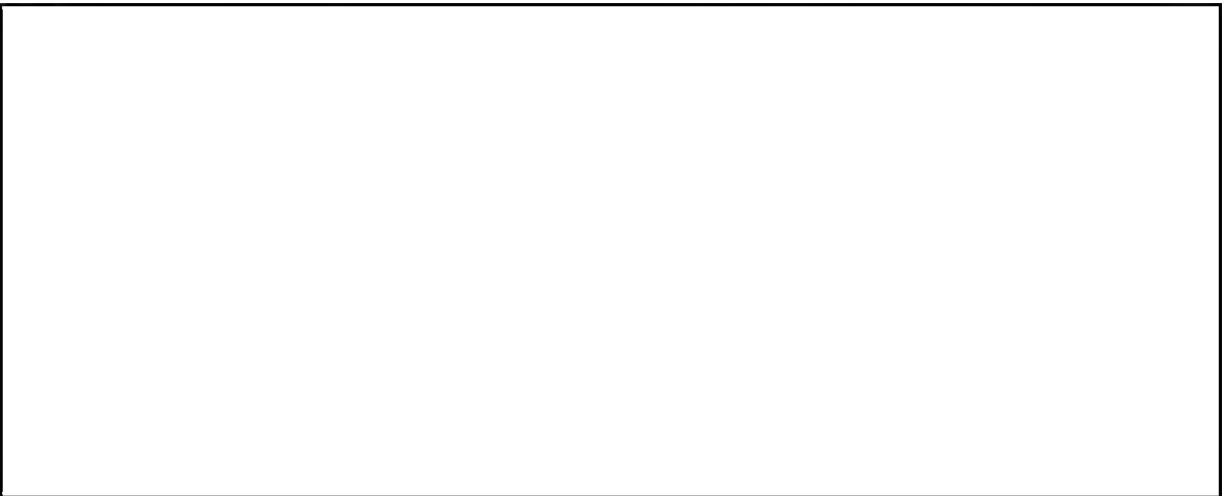
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OVERNIGHT REPORTS

(The items in the Overnight Reports section have not been coordinated within the intelligence community. They are prepared overnight by the Office of Current Operations with analyst comment where possible from the production offices of NFAC.)

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Saudi Arabia

The US Embassy in Jidda reported late yesterday that Crown Prince Fahd had flatly denied to visiting US Commerce Secretary Kreps that his government had made any decision either to raise its oil price or to reduce production. Fahd specifically rejected any thought of pricing incremental output at the rate for the fourth quarter. The Embassy will cable a detailed report on the Fahd-Kreps talk, and US Ambassador West expects to discuss the Saudi stand on price and production with Oil Minister Yamani today.

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Japan

The US Embassy in Tokyo reports that Japanese energy officials have become quite pessimistic over the last month about oil supplies and have begun to indicate publicly their concern--but not its depth. Those officials believe serious shortages could develop within the next two months; the key factor is the extent to which the Iranian shortfall can be made up from increased Saudi production. Ambassador Mansfield concludes that while Japanese officials have not mentioned Alaskan oil or the glut of oil on the US West Coast in talks with the Embassy, this situation must bother the Japanese seriously.

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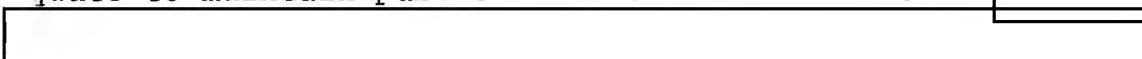
Libya-Chad

The US Embassy in Tripoli notes that Libyan broadcasts on Thursday and yesterday have broken a nearly two-month-long silence on the situation in Chad and are calling for the ouster of President Malloum. The Embassy comments that Libya had been engaged only in a tactical standstill in its silence and that its alacrity in reporting Muslim street demonstrations in Ndjamen on Saturday is further evidence that Tripoli is anxious to reinforce domestic perceptions of the religious battle lines drawn in Chad's civil war. As of mid-Sunday,

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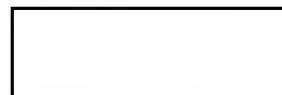
[redacted] the city was calm, following Muslim demonstrations on Saturday in the central market area, and that forces loyal to President Malloum have been reinforced and appear adequate to maintain public order over the near term.

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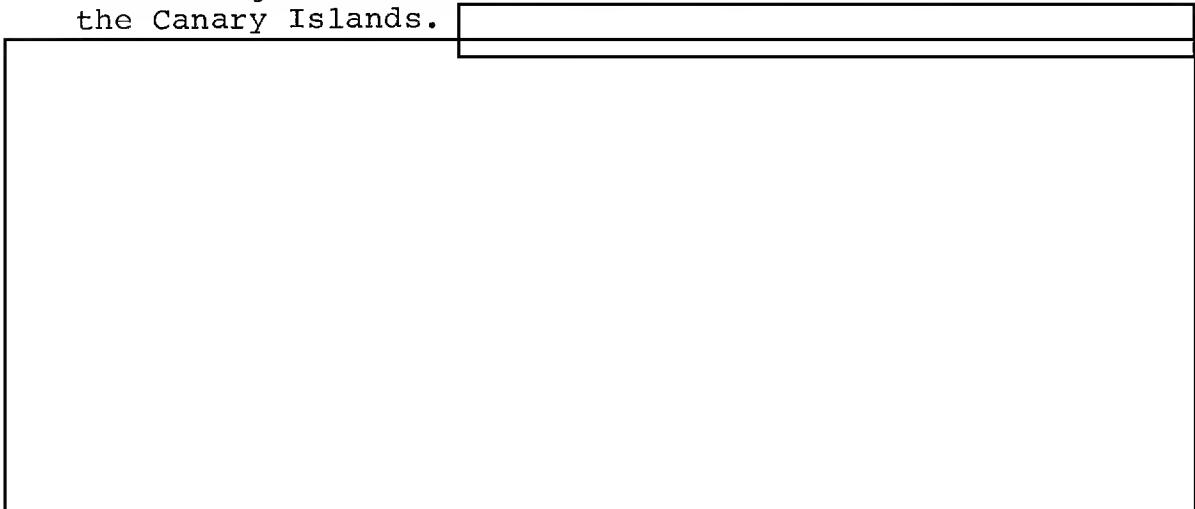
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Spain-Iraq

The US Embassy in Madrid has learned that during Defense Minister Gutierrez Mellado's recent visit to Iraq, the Iraqis were unusually cordial and appeared interested in buying Spanish-made armored personnel carriers and small landing craft. The Embassy notes that Madrid is intent on wooing Arab states, even radical ones such as Libya and Iraq--King Juan Carlos stopped in Baghdad last year on his way to China. Spain has cultural/historic ties to the Arab world, wants an assured oil supply and Arab trade and investment capital, and needs Arab diplomatic support in dampening interest within the Organization of African Unity in independence for the Canary Islands.

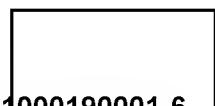
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Rhodesia

On the eve of tomorrow's white referendum in Rhodesia, the US Embassy in Pretoria notes that emigration/immigration figures for December show a net loss of 2,771, raising the total emigration for 1978 to 13,709. Each number represents the highest such figure in Rhodesia's history. The Embassy comments that the net loss of whites during 1977-78 approximates 10 percent of Rhodesia's white population.

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